

# Oregon Enterprise Zone Authorization Application\*

Complete form and submit to the local enterprise zone manager **before** breaking ground or beginning work at the site.

## Applicant

Enterprise zone or rural renewable energy development zone (where business firm <b>and</b> property will be located)		Email	
Name of business firm		Phone	
Mailing address	City	State	ZIP code
Location of property (street address if different from above)	City	State	ZIP code
County, TRS map ID number, and Tax lot number of site	Contact person	Title	

My firm expects to first claim standard property tax exemption in (up to three consecutive) year(s): \_\_\_\_\_  
 (Following year "Placed in service" on page 2.)

- Check here if your firm has or has had another exemption in this enterprise zone.
- Check here that you understand the need to renew the authorization pursuant to this application by April 1 after every two calendar years, until the tax exemption on qualified property is successfully claimed.
- Check here if requesting an **extended abatement** of one or two additional years of exemption, through written agreement with the sponsoring city, port, or county government(s) ("zone sponsor"), and subject to additional state or local requirements.

### Zone manager use only (after written agreement but before authorizing firm):

County average wage: \$ \_\_\_\_\_ Year \_\_\_\_\_ Total exemption period:  4 or  5 Consecutive years (check one)

## Business eligibility

**Eligible activity**—Check all activities that apply to proposed investment within the enterprise zone:

- Manufacturing  Fabrication  Bulk printing  Shipping  Agricultural production  Energy generation
- Assembly  Processing  Software publishing  Storage (warehousing)  Back-office systems
- Other—describe the activities that provide goods, products, or services to other businesses (or to other operations of your firm): \_\_\_\_\_

Check here if your business firm does or will engage in **ineligible activities** within the enterprise zone (such as retail sales, health care, professional services, or construction). Describe below (or in an attachment) these activities and their physical separation from "eligible activities": \_\_\_\_\_

**Special cases**—Check all that apply:

- Check here if a **hotel, motel, or destination resort** in an applicable enterprise zone.
- Check here if a **retail/financial call center**. Indicate expected percent of customers in local calling area: \_\_\_\_\_%.
- Check here if a **"headquarters" facility**. (Zone sponsor must find that operations are statewide–regional in scope and locally significant)
- Check here if an **electronic commerce investment** in an e-commerce enterprise zone.

### Employment in the enterprise zone (see worksheets on last page)

**Don't** count FTEs, temporary, seasonal, construction, part-time jobs (32 hours or less per week), or employees working at ineligible operations.

**Existing Employment**—My business firm's average number of full-time employees **inside the zone** over the past 12 months is \_\_\_\_\_

- New Employees**—
- Hiring is expected to begin on (date or month and year): \_\_\_\_\_
  - Hiring is expected to be completed by (month and year): \_\_\_\_\_
  - Estimated number of new employees to be hired with this investment is: \_\_\_\_\_

**Commitments**—By checking all boxes below, you agree to the following commitments as required by law for authorization:

- By April 1 of the first year of exemption on the proposed investment in qualified property, I will have increased the number of my firm's employees within the zone by the greater of one new job or by 10%.
- My firm's annual average number of employees will equal or exceed that minimum increase during the exemption period.
- When the exemption claim is filed by April 1 following each calendar year of exemption, my total number of employees in the zone will not have shrunk by more than 85% or by more than 50% twice in a row, compared to the highest total number in any previous claim.
- My firm will comply with local additional requirements as contained in: (1) a written agreement for extended abatement, (2) zone sponsor resolution(s) waiving required employment increase inside zone, or (3) an **urban** enterprise zone's adopted policy, if applicable.
- My firm will verify compliance with these commitments, as directed by local or state officials according to statute or administrative rule.
- My firm will enter into a **first-source hiring agreement** before hiring new eligible employees. (This **mandatory** agreement entails an obligation to consider referrals from publicly funded job training providers for eligible job openings within the zone during exemption period.)

\*Also for Rural Renewable Energy Development Zones.

**Oregon employment outside the enterprise zone**

**Check only those that apply:**

- Check here if yours or any commonly controlled firm will curtail operations in the state **beyond 30 miles of the zone boundary and move them into the zone.** Indicate timing, location, number of any job losses, and relationship to the proposed enterprise zone investment:

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- Check here if you are transferring operations into the zone from site(s) in the state **within 30 miles of zone boundary:**  
My firm's average number of employees at the site(s) outside the zone boundary over the preceding 12 months is \_\_\_\_\_.
- Check here, if applicable, that your firm commits to increase the combined employment at the site(s) (outside but within 30 miles of zone boundary) and in the zone to 110% of the existing combined level by April 1 and on average during the first year of exemption.

**Proposed investment in qualified property**

**Anticipated timing** — Enter dates or months/years (non-binding)

Action	Site and building and structures			Machinery and equipment		
	Preparation	Construction*	Placed in service	Acquisition**	Installation	Placed in service
To commence or begin on						
To be completed on						

- \* Including new reconstruction, additions to, or modifications of existing building(s) or structure(s).
- \*\* Taking possession of machinery and equipment through lease or purchase, or otherwise bringing it into the county, (including personal property), which must occur after January 1 of the year preceding its first exemption year or the date six months prior to the date of this application, whichever is earlier.
- Check here for building/structure acquired/leased from an unrelated 3rd party, for which reconstruction, additions, or modifications began prior to this application (attach executed lease or closing documents, and don't take up occupancy until this application is approved).

**Qualifying property:** Estimates are not binding, but in order for property to be exempted, its basic type and currently expected cost for any major improvement must be represented below.

Type of property		Number of each/item	Estimated cost	Check if any item will be leased
Real property	Building or structure to be newly constructed		\$	<input type="checkbox"/>
	New addition to or modification of an existing building or structure		\$	<input type="checkbox"/>
	Heavy or affixed machinery and equipment		\$	<input type="checkbox"/>
Personal property item(s) costing:	\$50,000 or more		\$	<input type="checkbox"/>
	\$1,000 or more (E-commerce zone or used exclusively for production of tangible goods)		\$	<input type="checkbox"/>
<b>Total estimated cost of investment</b>			\$	

Describe below (or in an attachment) the overall nature and potential extent of your investment, including site plans or list of property items to be acquired, as appropriate and recommended by zone manager or county assessor, and as may be kept confidential.

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**Declaration**

I declare under penalties of false swearing [ORS 305.990(4)] that I have examined this document and attachments, and to the best of my knowledge, they are true, correct, and complete. If any information changes, I will notify the zone manager and the county assessor and submit appropriate written amendments. I understand that my business firm will receive the tax exemption for property in the enterprise zone, only if my firm satisfies statutory requirements (ORS Chapter 285C) and complies with all local, Oregon, and federal laws that are applicable to my business.

**Must be signed by an owner, company executive, or authorized representative of the business firm**

Signature	Date
<b>X</b>	
Title (if not an owner or executive, attach letter attesting to appropriate contractual authority)	

**Local enterprise zone manager and county assessor must approve this application (with Enterprise Zone Authorization Approval, Form 150-303-082)  
For more information visit: [www.oregon.gov/biz/](http://www.oregon.gov/biz/)**